

100

# SIEBEL CRM OnDemand

Search

Contacts

Advanced Search

Create

Task

Appointment

Contact

Opportunity

Account

Lead

Service Request

Solution

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Service

## Forecast Definition

Forecast Definition Update

Create Forecast Snapshot Each Week Active

Forecast Snapshot Day Sunday

}-102

Next Forecast Series Dates

Forecast Date

11/23/2003

~103

Forecast Series Participants

Last Name

Phillips

Rogers

Taylor

Waller

Williams

First Name

Ethan

Rick

Ryan

Lisa

Joan

All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Previous Next

All 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Previous Next

Number of records displayed: 25

Fig. 1

**SIEBEL**

**CRM OnDemand**

Search

Contacts

Advanced Search

Submit

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Service

CustomerCare Training Admin MySetup Deleted Items Help

**Forecast Definition**

Step 1

Step 2

Step 3

Create

Task

Appointment

Contact

Opportunity

Account

Lead

Service Request

Solution

Select your forecast snapshot frequency

Create Forecast Snapshot Each \*

Week

\* = Required Field

Next Cancel

Next Cancel

Fig. 2

Home Calendar Leads Accounts Contacts Opportunities Forecasts Reports Solutions Service Campaigns Dashboard Deleted Items

© 2003 Siebel Systems, Inc. All Rights Reserved

CRM OnDemand Terms of Use Privacy Statement

**SIEBEL**

CRM OnDemand

Search

Contacts

Advanced Search

Create

Task

Appointment

Contact

Opportunity

Account

Lead

Service Request

Solution



Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Admin

MySetup

Deleted Items

Help

Search

**Forecast Definition**

Help Tutorial Back

Step 1

Step 2

Step 3

Select your forecast type for forecast date

Forecast Snapshot Day\* Sunday

\* = Required Field

302

301

400

le Edit View Favorites Tools Help

Back

Search

Media

Go

Google

Search Web

Search Site

PageRank

https://od1.siebel.com/OnDemand/user/ForecastAdm

SIEBEL

CRM OnDemand

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Serv

Forecast Definition

Help

Tutorial

Back

Step 1

Step 2

Step 3

Previous

Finish

Cancel

Select the Roles you wish to include in your forecast. The users related to each role will be the forecast participants.

Company Roles

Field Sales Rep

Service Manager

Service Rep

Forecasting Roles

Executive

Sales & Marketing Manager

Inside Sales Rep

Administrator

Previous

Finish

Cancel

Home

Calendar

Leads

Accounts

Contacts

Opportunities

Forecasts

Reports

Solutions

Service

Campaigns

Dashboard

Deleted Items

© 2003 Siebel Systems, Inc. All Rights Reserved

CRM OnDemand

Terms of Use

Privacy Statement

one

Internet

401

402 403 404

Fig 4



600

2601

2602

603

### Forecast Detail

Created for: Joan Williams    Create Date: 9/21/2003    Status: Active

Forecast Summary					
Date	Quota	Closed Revenue	Quota %	Forecast	Best Case
7/1/2003		\$3,450,000.00	0%	\$25,200,000.00	\$0.00
8/1/2003		\$2,350,000.00	0%	\$5,950,000.00	\$0.00
9/1/2003		\$2,000,000.00	0%	\$12,800,000.00	\$0.00
Totals	\$0.00	\$7,800,000.00		\$43,950,000.00	\$0.00
				\$55,050,000.00	\$26,315,014.95

Team's Summary by Month									
All: 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z									
Owner Alias	Date	Quota %	Forecast	Closed Revenue	Best Case	Pipeline	Last Updated		
ROGERS	7/1/2003	0%	\$1,600,000.00	\$1,200,000.00	\$0.00	\$1,600,000.00	9/21/2003 11:23:38 PM		
ROGERS	8/1/2003	0%	\$2,400,000.00	\$800,000.00	\$0.00	\$2,400,000.00	9/21/2003 11:23:38 PM		
ROGERS	9/1/2003	0%	\$3,200,000.00	\$1,200,000.00	\$0.00	\$6,400,000.00	9/21/2003 11:23:38 PM		
RTAYLOR	7/1/2003	0%	\$21,600,000.00	\$1,050,000.00	\$0.00	\$29,500,000.00	9/21/2003 11:23:37 PM		
RTAYLOR	8/1/2003	0%	\$350,000.00	\$350,000.00	\$0.00	\$350,000.00	9/21/2003 11:23:37 PM		
Totals			\$34,750,000.00	\$4,600,000.00	\$0.00	\$45,850,000.00			
All: 0-9 A B C D E F G H I J K L M N O P Q R S T U V W X Y Z									

Show Full List

My Opportunities									
Close Date	Forecasted	Opportunity Name	Account Name	Revenue	Sales Stage	Next Step			
Refresh	9/3/2003	Y	Bay Construction - Std Order - 5 Phoenix 900	Bay Construction	\$400,000.00	6 - Closed/Won	Call		
Refresh	9/3/2003	Y	Bay Demolition Services - Std Order - 5 Phoenix 900	Bay Demolition Services	\$400,000.00	7 - Closed/Lost	E-mail		
Refresh	9/30/2003	Y	Bobcat Loaders & Excavators - Std Order - 5 Phoenix 900	Bobcat Loaders & Excavators	\$400,000.00	3 - Short List	None		
Refresh	8/18/2003	Y	Carter's Rigging & Supply - Std Order - 5 Phoenix 900	Carter's Rigging & Supply	\$400,000.00	6 - Closed/Won	None		

Fig. 6

700

701

# SIEBEL CRM OnDemand

Search

Contacts

Advanced Search

Submit

- Create:
- Task
  - Appointment
  - Contact
  - Opportunity
  - Account
  - Lead
  - Service Request
  - Solution

## Forecast Edit

Forecast Summary				
Forecast Date	Closed Revenue	Forecast	Best Case	Pipeline
7/1/2003	\$3,450,000.00	\$25,200,000.00	\$0.00	\$33,100,000.00
8/1/2003	\$2,350,000.00	\$5,950,000.00	\$0.00	\$5,950,000.00
9/1/2003	\$2,000,000.00	\$12,800,000.00	\$0.00	\$16,000,000.00
Totals	\$7,800,000.00	\$43,950,000.00	\$0.00	\$55,050,000.00
				\$26,315,014.95

Fig 7

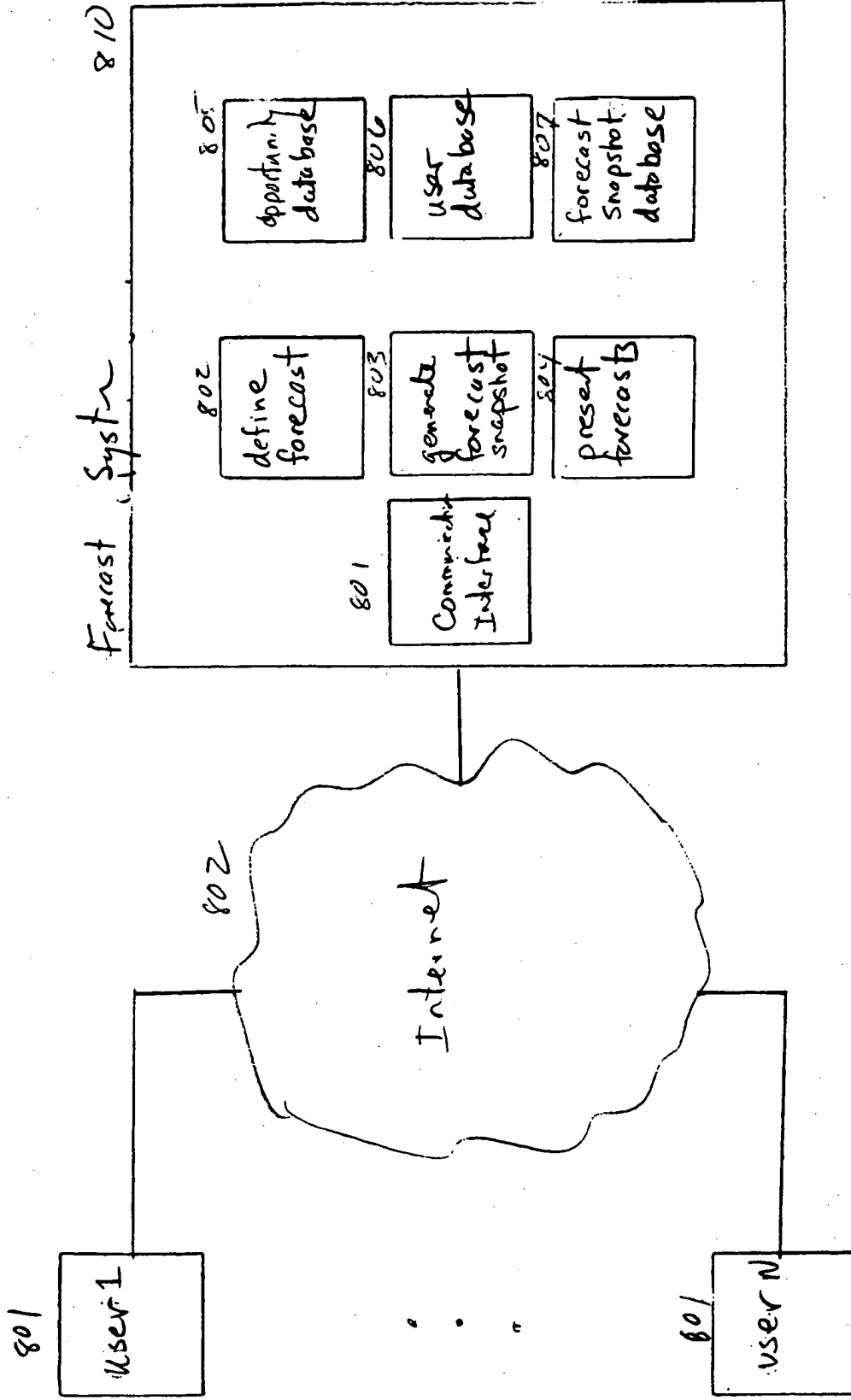


Fig 8



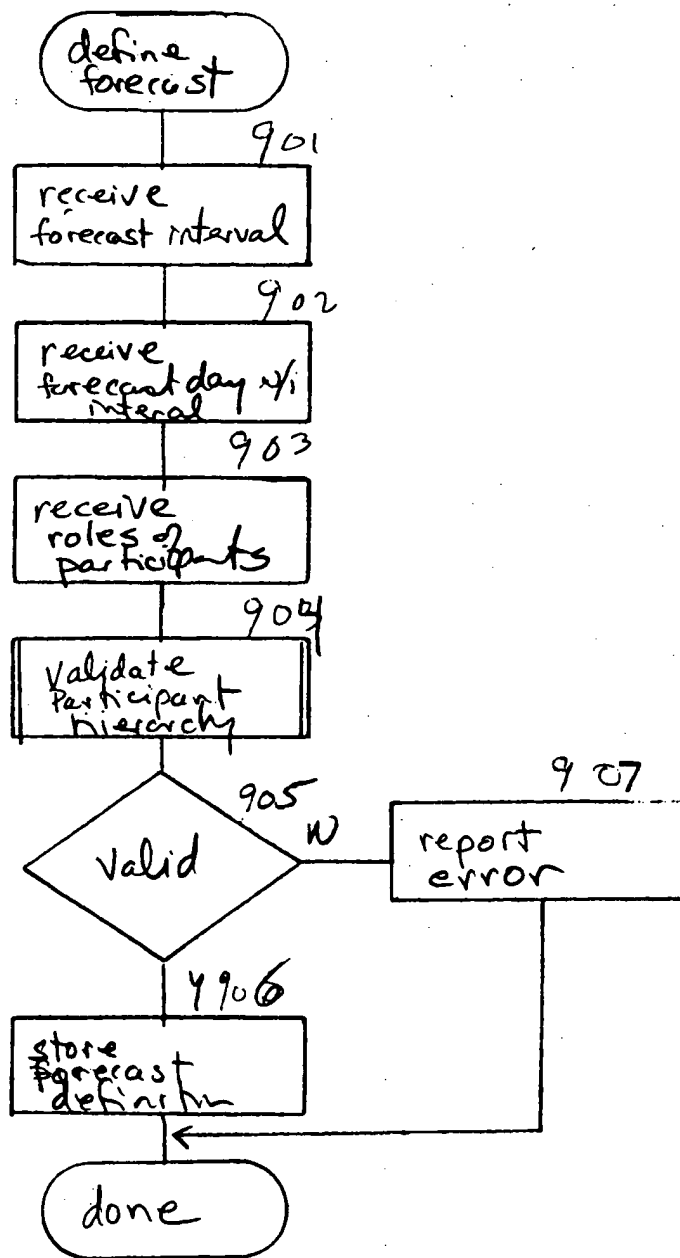


Fig 9

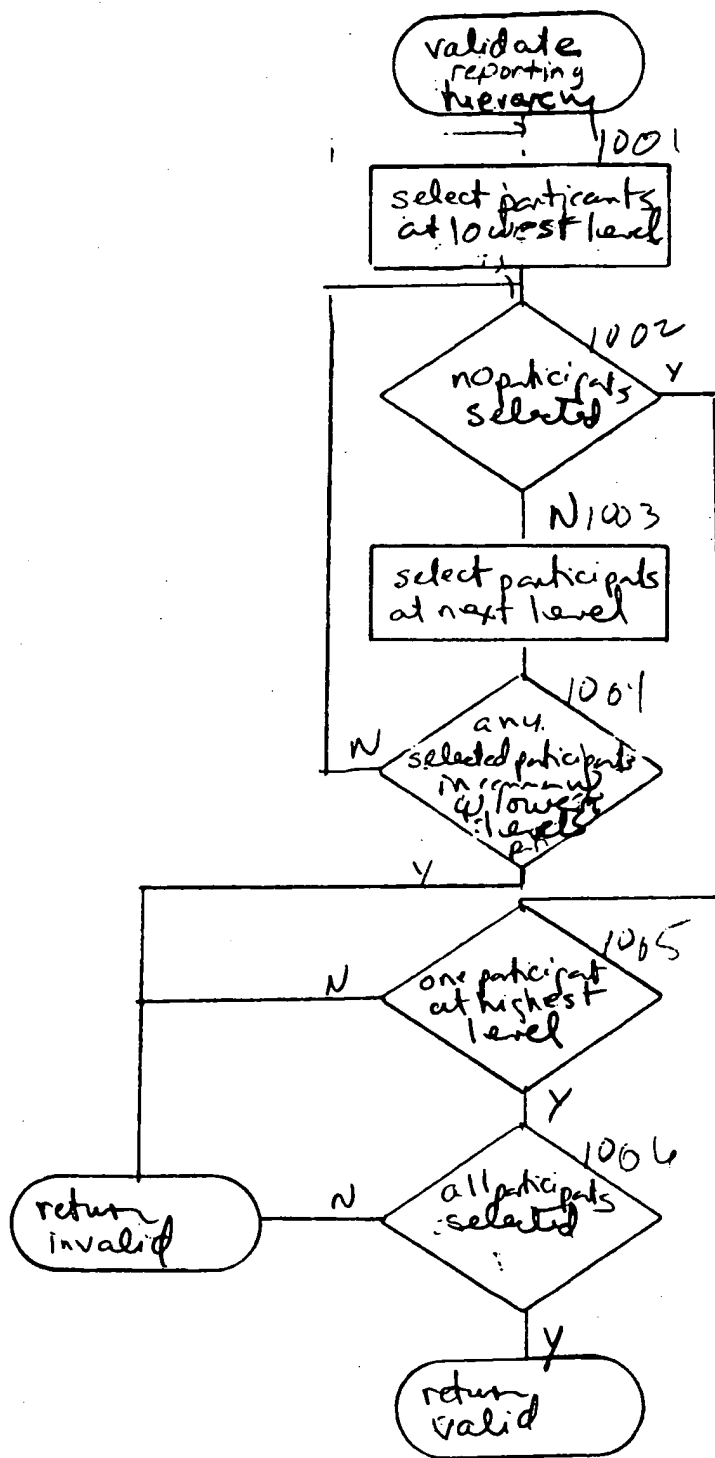


Fig 10

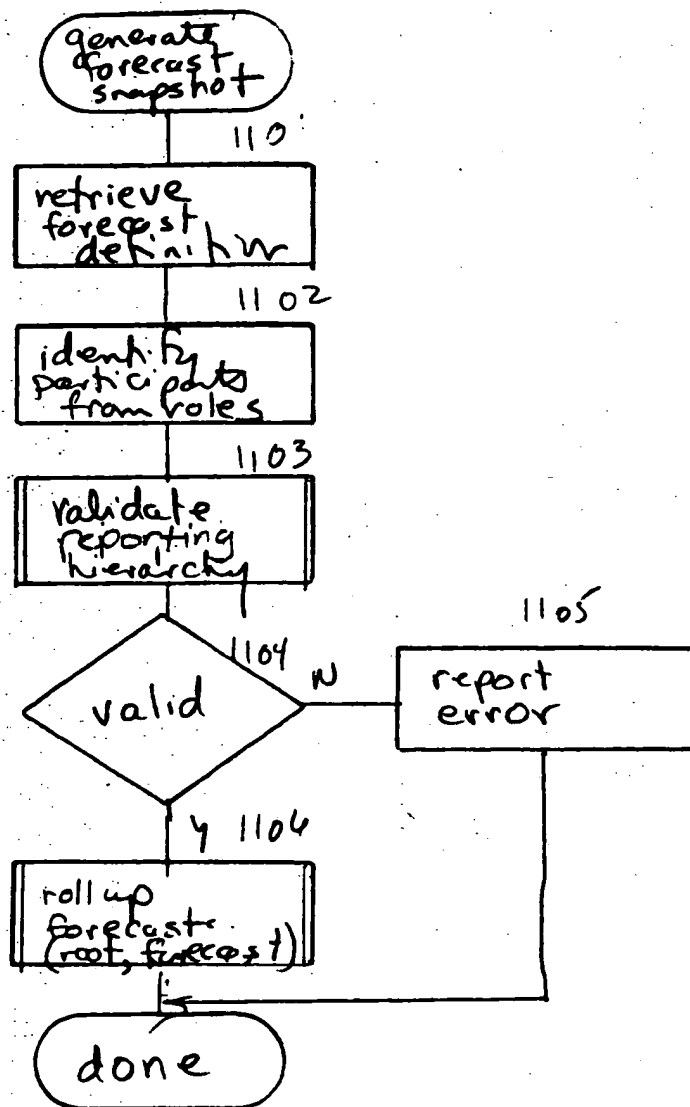


Fig 11

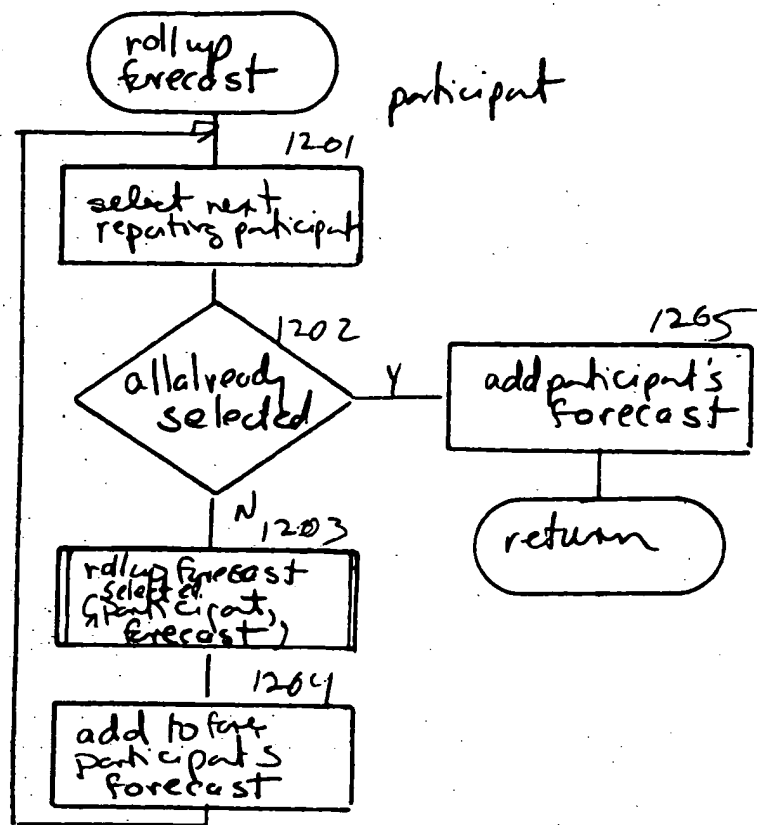


Fig 12

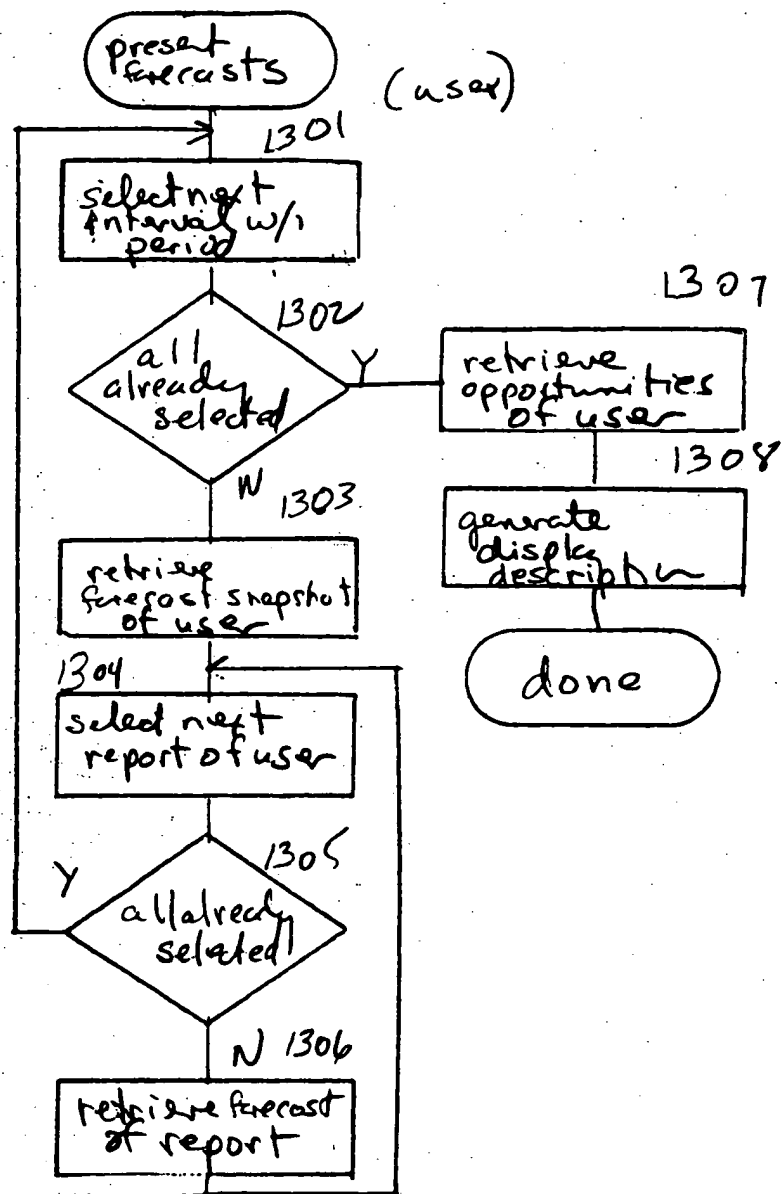


Fig 13